



## GSA Schedule Order: Contract File Checklist

*Current as of February 13<sup>th</sup>, 2015*

This checklist may be used for the award of task or delivery orders against General Services Administration (GSA) Federal Supply Schedule (FSS) contracts (also referred to as "Multiple Award Schedule" or "GSA Schedule" contracts) and the establishment of Blanket Purchase Agreements (BPAs) against GSA FSS contracts.

**Note 1:** Additional Agency level and/or local requirements may apply and should be followed in addition to the items identified below.

**Note 2:** All items listed below will not apply to every order. This checklist should be used at the contracting officer's discretion.

**Note 3:** The Economy Act does not apply to orders placed against GSA Schedules (FAR 17.502-2(b)).

**Note 4:** Procedures in FAR 15 do not apply to orders placed against GSA Schedules, except DOD activities see class deviation on determination of fair and reasonable pricing.

<http://www.acq.osd.mil/dpap/policy/policyvault/USA001004-14-DPAP.pdf>

<b>GSA Schedule Contract Number:</b>	
<b>Contractor Name:</b>	
<b>Contractor Point of Contact Information:</b> [Insert name] [Insert address] [Insert email address] [Insert telephone number]	
<b>Delivery / Task Order or BPA Number:</b>	
<b>Award Date:</b>	
<b>Base Period of Performance (excluding options):</b>	
<b>Period of Performance (including options):</b>	
<b>Contract Specialist:</b> [Insert name] [Insert email address] [Insert telephone number]	<b>Contracting Officer:</b> [Insert name] [Insert email address] [Insert telephone number]
<b>Contracting Officer Representative:</b> [Insert name] [Insert email address] [Insert telephone number]	

Tab Section/Tasks	Complete	Date
<b>Tab A – Award Documents</b>		
Signed original task or delivery order (e.g. SF1149)		
Signed original modifications		
Contract Action Report from Federal Procurement Data System-Next Generation (FPDS-NG)		
<b>Tab B – Pre-solicitation</b>		
Acquisition Requirements Package (check each sub-task below):		
❖ Contract Action Request		
❖ Acquisition Strategy		
❖ Acquisition Plan (AP) (FAR 8.404(c)(1); FAR Subpart 7.1)		
❖ Independent Government Estimate (IGE)		
❖ Description of the supplies or services (e.g., Performance Work Statement)		
❖ Funding document		
❖ Contract Data Requirements List (CDRL)		
❖ Other acquisition request document(s)_____		
Market research documentation (FAR 10.002(e))		
Information Technology (IT) acquisition strategy (FAR 8.404(c)(1); FAR 39.101(b)(2))		
Limited Source Justification (LSJ) (FAR 8.405-6)		
Procedures for placing orders under Blanket Purchase Agreements (BPAs) (FAR 8.405-3(a)(3))		
Small Business Review Form (e.g., DD Form 2579) – (FAR 7.104(d); FAR 8.405-5)		
Certifications for assisted or direct acquisitions by a non-DOD agency, if applicable (DFARS 217.5; DFARS 217.78)		
Required file reviews and approvals (e.g., legal review, policy review)		

Quality Assurance Surveillance Plan		
Other _____		
<b>Tab C – Determinations and Pre-solicitation Clearances</b>		
SAM Exclusions, <a href="http://www.sam.gov">www.sam.gov</a> (FAR 9.405(b))		
Use and evaluation of options (FAR Subpart 17.2)		
Non-personal services (FAR 37.103(a))		
Use of government-furnished property, equipment, or information (FAR Subpart 45.3)		
Service Contract requirements (FAR 37.103, DFARS 237.170-1)		
IT clearance (FAR Part 39)		
Security Requirements Consideration (FAR 4.404)		
Acquisition of printing and other related supplies (FAR Subpart 8.8)		
Determination of Best Procurement Approach for orders exceeding \$500,000 (FAR 17.500(c)(2); 17.502-1) (Agency threshold may be lower, e.g. Army is \$150,000)		
Other _____		
<b>Tab D – Solicitation/Ordering Procedure</b>		
Request for Quotation and amendments (FAR 8.405-1(c)(2); 8.405-2(c))		
Rating/Evaluation Plan		
GSA eBuy posting (FAR 8.405-1(c)(2); 8.405-2(c)) <sup>1</sup>		
List of Federal Supply Schedule (FSS) contractors surveyed and their prices quoted (FAR 8.405-1(c)(1))		
Solicitation correspondence		
Other _____		
<b>Tab E – Technical Evaluation</b>		
Signed technical evaluation sheets/report (FAR 8.405-2(d))		
Conflict of interest/confidentiality forms for reviewers (FAR 3.104)		

<sup>1</sup> While GSA eBuy is not mandatory, it is the preferred method for meeting fair opportunity requirements.

Other _____		
<b>Tab F – Unsuccessful Quotations</b>		
Unsuccessful respondent's technical and price quotation		
<b>Tab G – Successful Quotation</b>		
Successful respondent's technical and price quotation (FAR 4.803)		
Approved Pricing Schedule/Table <sup>2</sup>		
Other _____		
<b>Tab H – Price Evaluations/Reductions</b>		
Evaluation Team analysis of contractor's price/technical quotation		
Record of price reductions/discounts sought/obtained (FAR 8.404(d); 8.405-1(d); 8.405-2(c)(3); 8.405-4)		
Questions and responses, including record of oral discussions (FAR 4.803)		
Price evaluation/best value analysis and award decision documentation (FAR 8.405-1(c)(3); 8.405-1(e)) (For DOD activities Determination of Fair and Reasonable Pricing is required IAW DOD Class Deviation to FAR 8.404(d) issued on March 13, 2014.)		
Determination to use a Time & Materials or Labor Hour task order (FAR 8.405-2(e))		
Other _____		
<b>Tab I – Pre-award Documentation and Clearances</b>		
SAM Exclusions (FAR 9.405(d)(4))		
Required file reviews and approvals (e.g., legal review, policy review)		
System for Award Management verification (FAR Subpart 4.11)		
Data entry in FPDS-NG (FAR 4.602)		
GSA Schedule Contractor Team Agreement		
Contracting Officer Representative (COR) certification of training		

<sup>2</sup> Approved price list may be a screenshot from GSA Advantage for products or other pricing list provided by contractor and verified through GSA Advantage. For services, the approved labor rates should come from the pricelist posted in GSA eLibrary in the contractor's terms and conditions file found on the contractor detail page.

COR designation memorandum (FAR 7.104(e))		
Other _____		
<b>Tab J - Notices, Reports, Brief Explanations, and Protests</b>		
Award notification to unsuccessful respondents (FAR 8.405-2(d))		
Brief explanations/feedback documentation (FAR 8.405-2(d))		
Protest documentation, if applicable (FAR 33.103; 33.104)		
Award transmittal letter(s)		
Other _____		
<b>Tab K - Task Order Administration</b>		
Post-award orientation (FAR Subpart 42.5)		
Annual reviews for BPAs (FAR 8.405-3(e))		
Post-award correspondence		
<b>Tab L - Task Order Closeout</b>		
Completion of Contract Closeout Checklist (e.g., DD Form 1597)		
❖ Final cleared reports including certification from COR		
❖ Contractor's closing statement/release off claims/disputes (FAR 4.804-5)		
❖ Notification letter to Contractor		
❖ Final invoice/voucher (marked final)		
❖ Interim and final Past Performance Evaluation Report		
❖ Review contract funds and deobligate any excess funds (FAR 4.804)		
Data entry in FPDS-NG		